Terms and Conditions Module (TCM) for Grantees User Guide

June 30, 2025

NOTE: This user guide is an identical PDF version of the online help.

Contact Us

Additional Help Needed? Please contact the eRA Service Desk (https://www.era.nih.gov/need-help).

Toll-free: 1-866-504-9552; **Phone:** 301-402-7469

Hours: Mon-Fri, 7:00 a.m. to 8:00 p.m. Eastern Time

Feedback on the user guide? Please email the eRA Communications Office (era-communications@mail.nih.gov).

Disclaimer STATEMENT

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Latest Updates

Updates and new features in Terms and Conditions:

Overview of Terms and Conditions

The terms of a grant are the legal requirements imposed on the grant by the administering agency, whether based on statute, regulation, policy, or other document referenced in the grant award, or specified by the grant award document itself. The Notice of Award (NoA) may include both standard and special conditions that are considered necessary to attain the grant's objectives, facilitate post-award administration of the grant, conserve grant funds, or otherwise protect the Federal Government's interests.

The Terms and Conditions Module (TCM) enables grantee organizations to track due dates and submit supporting documents to satisfy the terms/milestones of their grant applications.

Terms and Conditions User Roles

Users with PI, SO and BO user roles can access terms/milestones in eRA Commons, view term tracking, add comments and submit supporting documentation.

View Tracked Terms

For grants that have tracked terms, a *View Terms Tracking* action is available in the in the eRA Commons Status screen:

Figure 1: View Terms Tracking link

Actions

Click **View Terms Tracking** to go to the [View Terms Tracking Details](#) screen: In that screen qualified grantee users (PD/PI,MPI,SO,BO) can see the details all terms and conditions applicable to the grant, and can submit documents as needed to satisfy award terms, and to respond to grantor requests for additional materials (RAMs).

Click **Correspondence** to send email to the SMHSA Program Official responsible for this grant: A new email message will open, addressed to the proper recipient and bearing the subject line: *Correspondence for Grant <grant number>*.

View Terms Tracking Details Screen for Grantees

The *View Terms Tracking Details* screen, shown below, opens when you click the **View Terms Tracking** button for a grant in the eRA Commons *Status* screen.

This screen displays the current tracking status of all terms applicable for the grant project period, broken out by budget period. The *Next Due Date Status* column displays color-coded badges to indicate whether a term is Not Tracked, Unresolved, or Resolved.

The PD/PI, BO and SO can view award terms and conditions and submit documents as needed to satisfy those requirements.

View Terms Tracking Details

Figure 2: View Terms Tracking Details screen for grantees

View Milestones Tracking Details

Figure 3: View Milestones Tracking Details screen

Working in this View

- Click a term name to see the text of the term.

- Click the 📁 folder icon next to the award number to open the Commons *Status Information* screen; or click the 📕 Acrobat icon next to the folder to view the Notice of Award.

Expanded View

Click the **>** right-arrow icon next to the term name, the click the **>** right-arrow icon next to *Term Content*, to open an expanded view of the term tracking details.

The expanded view lists the tasks associated with the term, and their due dates. *Due Date Status* displays color-coded badges to indicate whether a task is Resolved or Unresolved. *Submission Status* also displays color-coded badges to indicate whether a task has had No Submissions or is Unsubmitted, Submitted, or Returned.

Figure 4: Expanded view

Working in Expanded View

- Click on an attachment or comment to view it.

- Click the action menu ⟦•••⟧ for a specific task to select one of the following actions:

  - **Revise Documentation** — Attach documents and comments to the term task or view and edit existing attachments in the Additional Materials screen: If the grantor agency returns your document submission and requests changes or corrections, you can use this action to submit revised materials.

Note: This action is only available once you have submitted documentation for a task, but its due date status is still unresolved.

○ **View Submission** — View all the attachments and comments for this term task, consolidated into a single PDF.

TIP: This is the only action available once a task has been resolved.

○ **Prepare Documentation** — Attach documents and comments to the term task in the Additional Materials screen.

TIP: This action is only available when submitting documentation for the first time, and the task is unresolved.

Additional Materials Screen for Grantees

This screen opens when you click the **Prepare Documentation** or **Revise Documentation** action in the [View Terms Tracking Details](#) screen. Use this screen to upload and attach documents to a tracked term, or to view and edit existing attachments.

You can upload up to 10 files (PDF format only, maximum 6mb each). The uploaded files will be consolidated intro a single PDF attachment.

Figure 5: Additional Materials - grantee

Actions

- **Upload** — Click to browse and select a file to upload;
   and click again as needed to add additional files: another document row will be added to the grid; Browse to select the file to upload. You can include up to 10 files in a single attachment.
   Note: Alternatively, you can drag and drop up to 10 files at a time from your computer to the Submission Content area of the screen for to upload multiple files in one operation.
- **Delete** — Click to delete a file.

- **Comments**— Enter your comments about this submission: They will be included in the consolidated PDF attachment.
- **Preview** — Click to preview the complete attachment document: a consolidated PDF that includes the content of all the upload files plus the comments.
- **Save**— Click to save the upload files and the comments. You can click Save anytime, and return later to continue working on the submission. You must click **Save** to save any comments you entered.
- **Submit**— Click to send materials to the awarding agency
- **Remove Draft**— Cancel the document submission: If there was no previous submission then click to delete all uploaded files and comments and close the screen. If this is a revised submission then click to delete any changes (new uploads and/or comments) made since the last Submit action. Files and/or comments made in the previous submission will be kept.
- **Back** — Click to return to the [View Terms Tracking Details](#) screen. **Note**: Comments changes won't be saved unless you click **Save** or **Submit**. Any changes to file uploads will be retained in your draft until you click **Submit**.

Submission History - Grantee View

This section opens when you click the **Submission History** section heading at the bottom of the View Terms Tracking Details screen.

This screen displays the history of all grantee documents submitted for all terms on the grant.

Figure 6: Submission History - grantee view

The header lists the following information: Organization Name, Core Grant Number, Grant Program (PCC), Project Title, Budget Period Start Date, Budget Period End Date

View Submission History

Click the **>** right-arrow icon to expand the **Submission History** section.

The expanded section lists the history of events concerning RAM submissions for this term.

It contains the following information for each event:

- Event Type (Grantee Submission, Grantor Return Submission, Grantor Submission, Grantor Close)
- Event Date
- Term Name — click to open the [View Terms Tracking Details](#) screen
- Award Number
- Due Date
- Updated By — Name and role of the grantee or grantor user.
- File Name — Click to view the submitted document.
- Comment

Additional Department of Commerce (DOC) Resources

Online help for Department of Commerce (DOC) users is in progress. If needed, additional eRA training materials can be found on the following DOC webpage: https://connection.commerce.gov/collection/grants-enterprise-management-solution.

NOTE: This webpage is accessible only by DOC internal users.